


		Reference
	CalTABS User ID Requests	Number: <b>1043</b>
		Issue Date: <b>03/27/2013</b>
	Owner: <b>Office of Administration, Financial Management Branch Rates and Cost Recovery Section</b>	

## Distribution

All California Technology Agency employees and CalTABS users

## Introduction

The California Technology Agency Billing System (CalTABS) provides customers with secure online access to their monthly California Technology Agency services billing information.

CalTABS features include:

- Faster availability of invoice data.
- Additional billing details.
- Ability to export reports to Excel format.
- Free 24/7 access to online invoices.

Access to the CalTABS system requires a user ID and password. User IDs are based on the security level/group access for each department's billing/invoice information.

This document explains the process for requesting a CalTABS user ID and password. General questions regarding CalTABS should be sent to [ciobilling@state.ca.gov](mailto:ciobilling@state.ca.gov).

## Process to Request a CalTABS User ID

The process below should be used to request a new or to delete a CalTABS user ID:

1. Customer submits a Remedy Work Order or contacts the Service Desk to submit the work order.
  - The Service Desk can be contacted by phone at 916-464-4311 or email at [CIO Service Desk@state.ca.gov](mailto:CIO.Service.Desk@state.ca.gov).
  - The customer must indicate that approval was obtained from their Primary Customer Contact and note the Primary Customer Contact's name in the Remedy Work Order.
  - The following information must be included in the work order:

**Summary:** CalTABS user ID for (*Department Name*)

**Detailed Description:**

    - Department Name
    - Primary Customer Contact Approver Name
    - Name of Requestor
    - Email Address

- Position/Job Function
  - Phone Number of Requestor
  - Billing ID(s) for which access is being requested for
2. Service Desk assigns the work order to the Rates and Cost Recovery (RCR) distribution group.
  3. RCR staff reviews the work order for completeness.
  4. If the work order is approved, RCR staff emails the Primary Customer Contact to confirm and document approval of the requestor's CalTABS user ID. If RCR determines that the request is not valid, RCR can also disapprove the request.
  5. RCR staff reassigns the work order to CalTABS Security for processing of the request.
  6. CalTABS Security completes the request and emails the requestor their CalTABS user ID and temporary password.
  7. CalTABS Security marks the work order as "closed."